CLV Interim DM System User's Guide

This user's guide addresses the Windchill Interim Data Management (DM) workflow system, which is presently being used in CLV. The purpose of this system is to provide a process for distributing, reviewing, updating, and approving CLV documents. In order to use this system:

- It is necessary to have an Integrated Collaborative Environment (ICE) account, which is the same as a Windchill account.
- It is necessary to be invited to the Windchill CLV Product.
- It is also necessary to perform a browser configuration, whether using a PC or a Mac. If you already have an ICE account, browser configuration instructions may be found on the ICE Portal, https://ice.exploration.nasa.gov/iceportal/servlet/portal/action/ESMDLoginUser

Contact a member of the Information Technology (IT) Team for assistance with any of these items; contact information provided below.

IMPORTANT: If you encounter any problems or have any questions about this workflow, please contact a member of the IT Team:

The ICE Helpdesk – 1-866-419-6297 or
(b)(4)   256-541-2530 or
(b)(4)   -520-9639

A flow diagram of the Interim DM process steps and roles is presented below:
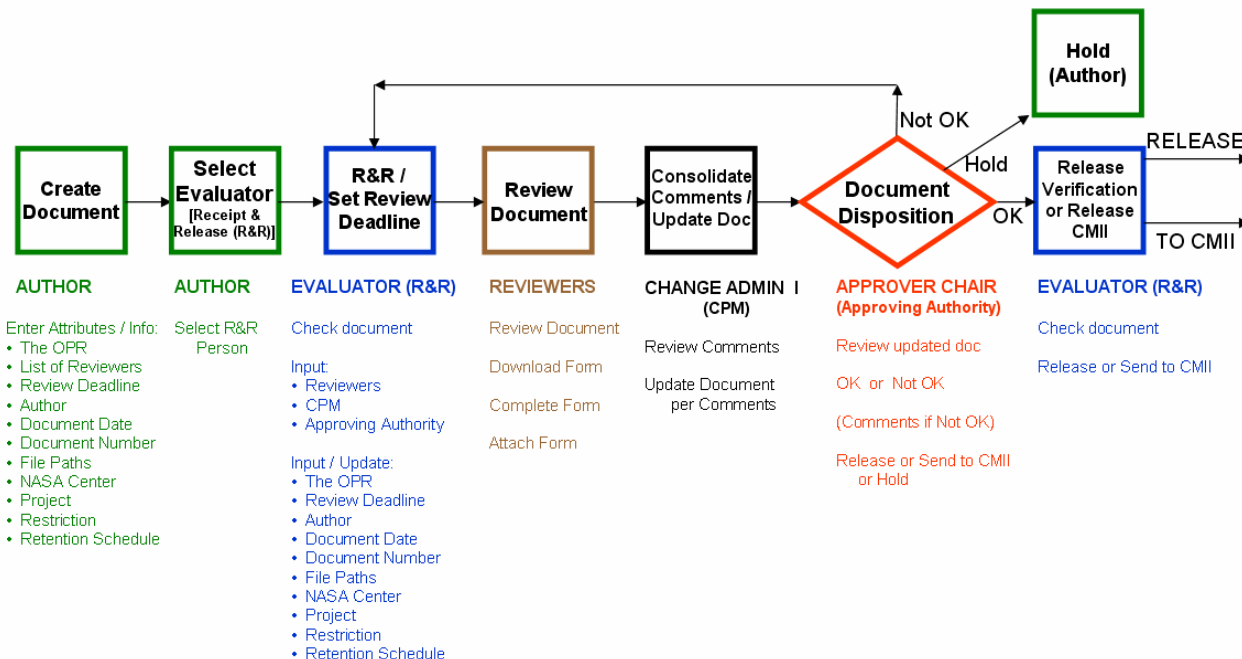
This workflow may be used in CEV and Cx in the near future.

There are five CDM roles represented in this workflow: Author, Receipt and Release, Reviewer, Change Package Manager (CPM), and Approving Authority. The following table shows the CDM role names, the attendant Windchill role names, and the pages in this manual that pertain to each role:

CDM Role	Windchill Role	Pertinent Pages in this manual
Author	Assignee	1-10, 20
Receipt and Release	Evaluator	1-2, 11-12, 18-19
Reviewer	Reviewer	1-2, 13-14
Change Package Manager (CPM)	Change Admin I	1-2, 15
Approving Authority	Approver Chair	1-2, 16-17

By using the "Pertinent Pages in this Manual," it should be easy to focus on the information needed for a specific role.

NOTE: With many Windchill operations, there is more than one way to accomplish the task. For brevity, we usually present one method here. Experienced users may choose to use alternatives.

General Access to Review Documents

Sign on to Windchill. Navigate to the CLV *Product* and click folders, as shown below. Make sure Current View is set to Folders and Contents, as shown below:
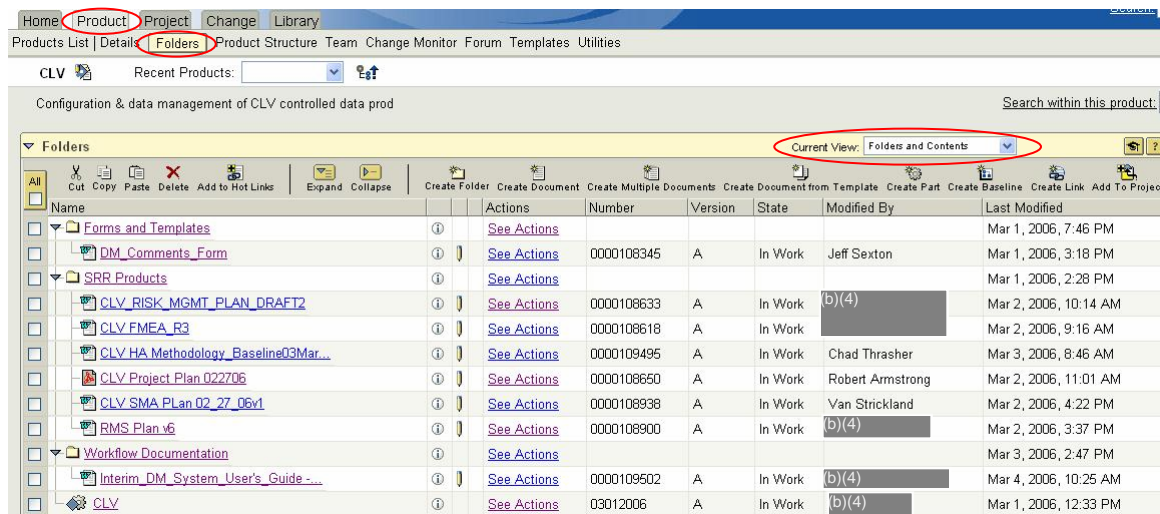
This provides access to the Review Products, Forms and Templates, and Workflow Documentation folders and contents.

CREATE DOCUMENT – AUTHOR

To create a document, begin by logging in to Windchill and clicking the Product tab, as shown. Then click Products List and select CLV. Selecting CLV may not be necessary if CLV is the only Product to which you have access. (NOTE: these screens show Constellation as the Product; for CLV document reviews, the Product will be CLV.)

Navigate to the folder where documents for this review will be stored. In this example, the folder is "DM Stuff." Click on the Create Document icon as shown.
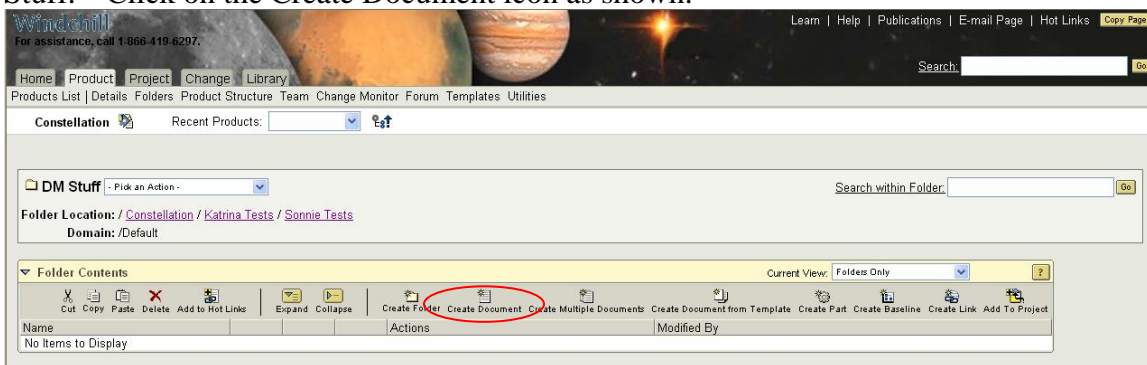
The document to be reviewed should have already been created and should be on your hard drive. Create Document will introduce the document into the Interim DM review process.

CREATE DOCUMENT – AUTHOR (continued)

For (Document) Type, select ConstellationDM as shown below:
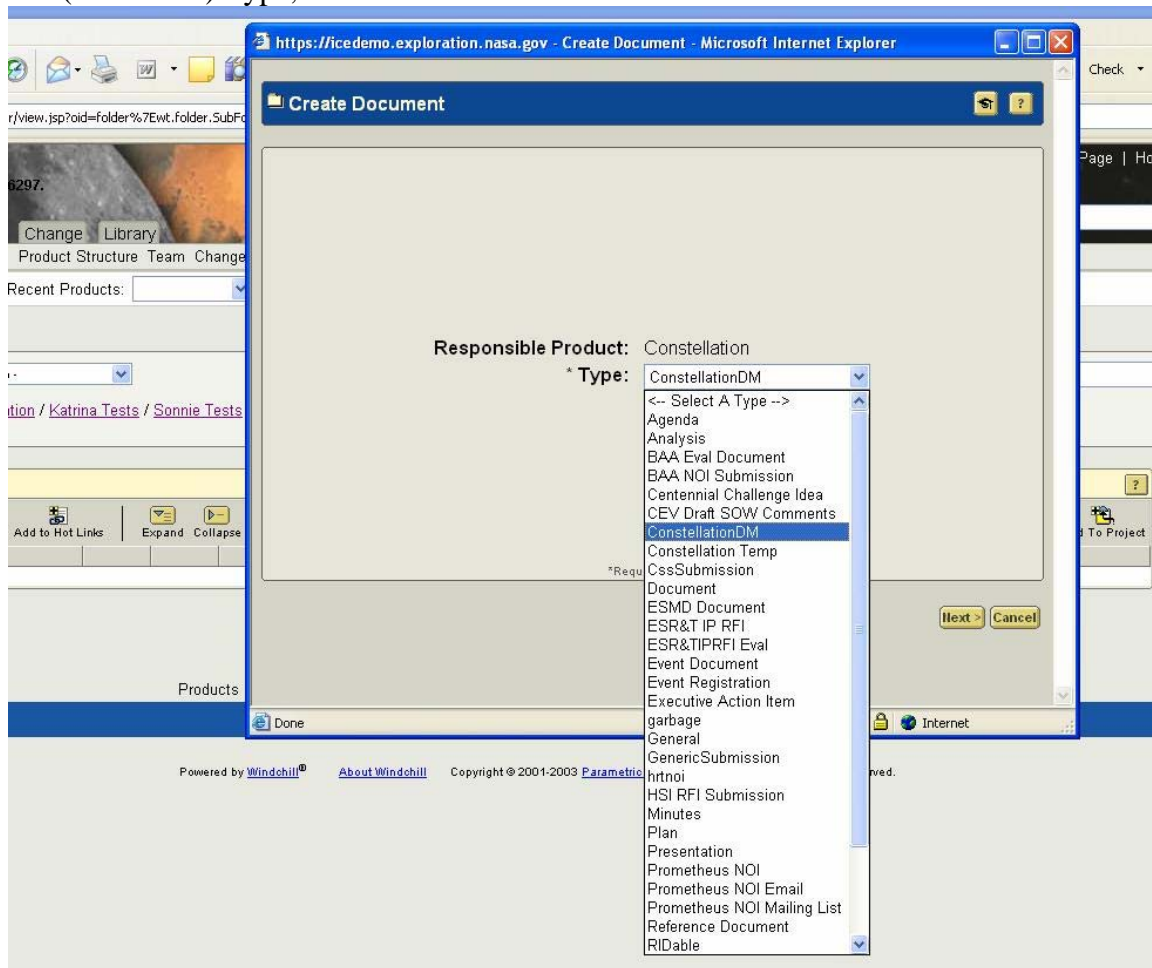
CREATE DOCUMENT – AUTHOR (continued)

Click on the Browse button and navigate to the location of the document to be reviewed on your hard drive. Fill in the Name, Title, and Description for this document. Click the Next button at the lower right part of the window.

CREATE DOCUMENT – AUTHOR (continued)

Fill in the values for the attributes shown below. Office of Primary Responsibility (OPR), Review Deadline, and Reviewers are mandatory inputs. The remaining inputs are optional, but fill in as many as are known.

IMPORTANT: For the Reviewers attribute, enter "see attached." We will use an attached file containing the lists of Mandatory and Optional Reviewers. That file will be attached using the next Windchill screen.

Click the Next button in the lower right when all entries have been made.

CREATE DOCUMENT – AUTHOR (continued)

A screen such as the one below will appear:
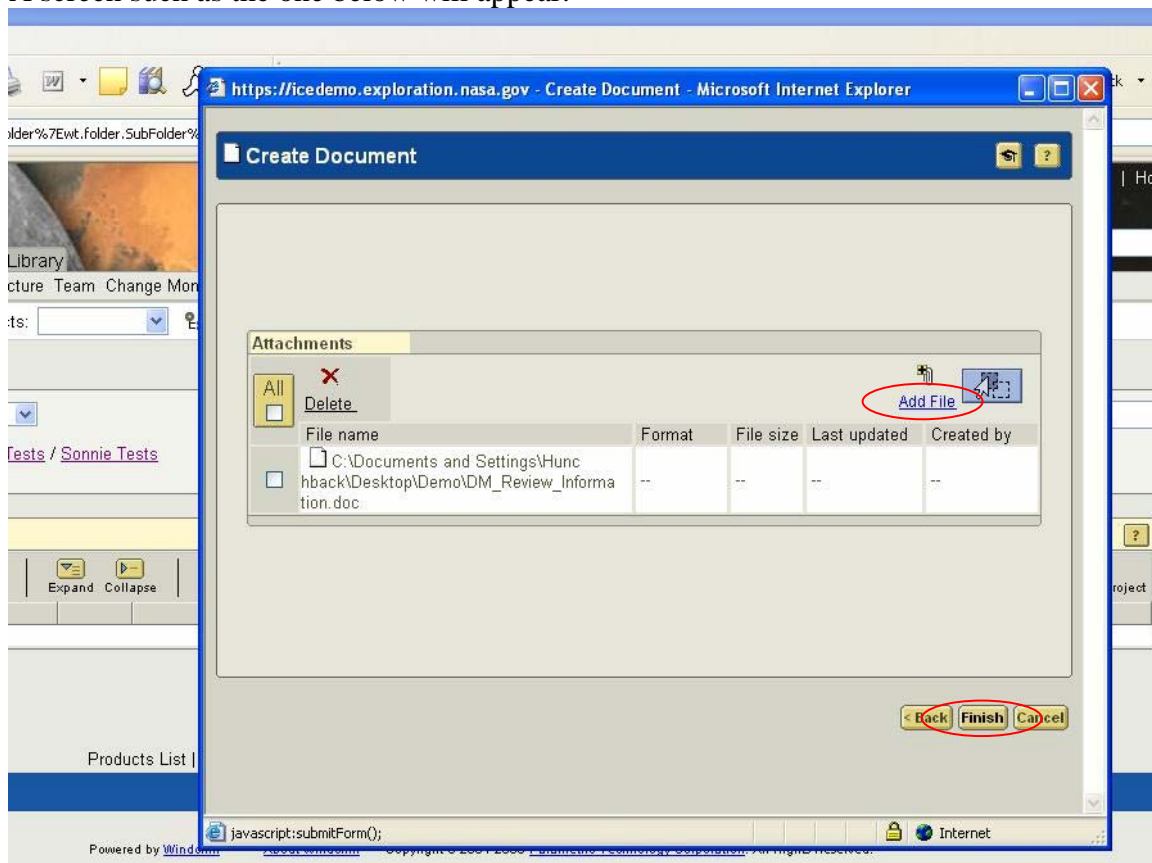
Use the Add File button as shown above to navigate to the file on your hard drive containing the lists of Mandatory and Optional Reviewers. NOTE: Make sure the file clearly indicates which Reviewers are Mandatory and which are Optional.

Click the Finish button in the lower right when complete.

CREATE DOCUMENT – AUTHOR (continued)
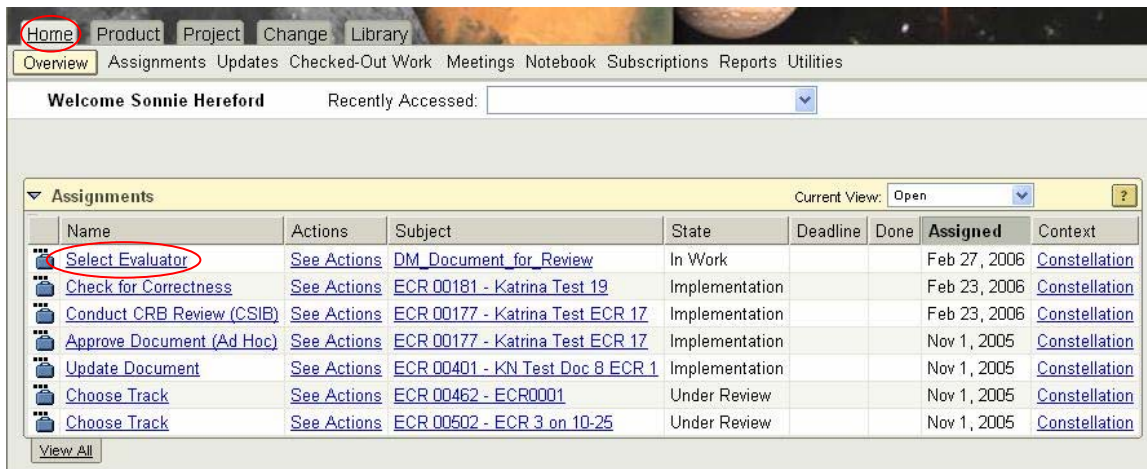
A screen such as the one below will appear, showing the file has been created:
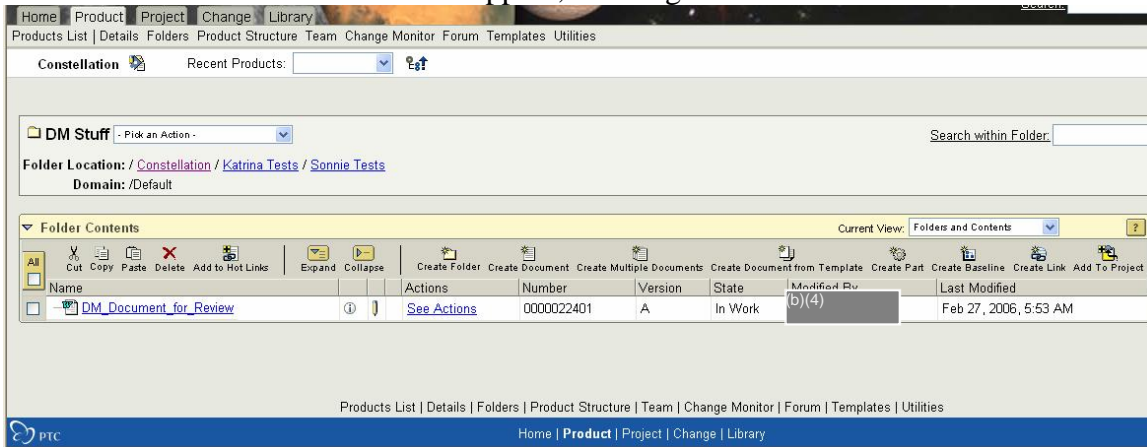
Important: Make sure Folders and Contents is chosen as the Current View as shown above. Otherwise, you will not be able to see the files contained within folders.

SELECT EVALUATOR – AUTHOR

As the Author of a document that has been created, you will receive an assignment e-mail from Windchill to Select the Evaluator. In CLV, Evaluator is referred to as the Receipt and Release role. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Select Evaluator assignment, as shown below:

Through either method, a screen such as the following will appear:

SELECT EVALUATOR – AUTHOR (continued)

In the applet at the bottom of the screen, set the Role pull-down to Evaluator. Select the Users tab. Enter the User Name of the person who will fill the Evaluator role. You may enter the first name (or the first part of it) with an asterisk at the end, as shown. You may also enter an asterisk followed by the last name. You may also enter the first and last names. In any case, after clicking the Find button, all users matching the criterion will be displayed. Select the one you want and click Add. The selected name will appear in the Participants box. NOTE: It is important to click save after your selection has been made. Otherwise, the selection will not be retained when this window is exited. Complete this assignment by clicking the Task Complete button.

RECEIPT AND RELEASE AND SET REVIEW DEADLINE – EVALUATOR

As the Evaluator (Receipt and Release Role), you will receive an assignment e-mail from Windchill to perform the Receipt and Release task and set the Review Deadline. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Receipt and Release and Set Review Deadline assignment, as shown below:

Through either method, a screen such as the following will appear:

Access the document being reviewed by clicking the document link, as shown above. Review the document for format and completeness. This is not a technical review.

RECEIPT AND RELEASE AND SET REVIEW DEADLINE – EVALUATOR (continued)

Assign the Reviewers, Change Admin I [Change Package Manager (CPM)], and Approver Chair (Approving Authority) by using the following steps. In the applet at the bottom of the screen, set the Role pull-down to Reviewer. Select the Users tab. Enter the User Name of the first person who will fill the Reviewer role. You may enter the first name (or the first part of it) with an asterisk at the end, as shown. You may also enter an asterisk followed by the last name. You may also enter the first and last names. In any case, after clicking the Find button, all users matching the criterion will be displayed. Select the one you want and click Add. The selected name will appear in the Participants box. Repeat the name entry and "find" for all desired Reviewers. NOTE: Mandatory Reviewers are entered in the same manner as Optional Reviewers. Repeat the above process for the Change Admin I role and for the Approver Chair role. NOTE: It is important to click save after all selections have been made. Otherwise, the selections will not be retained when this window is exited. Finally, set the Suspense Date, which is the date by which each Reviewer is asked to complete his/her review assignment. The format for this date is MM/DD/YYYY. Complete this assignment by clicking the Task Complete button.

REVIEW DOCUMENT – REVIEWER

When you are selected to review a document, you will receive a Review Document assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Review Document assignment, as shown below:

Through either method, a screen such as the following will appear:

Access the document by clicking the document link, as shown above. Download the DM Comments form using the link in line 2 of the instructions. Save the form to your hard drive then rename the form to include your

REVIEW DOCUMENT – REVIEWER (continued)

first initial and last name, e.g. DM_Comments_Form_S_Hereford.doc. Enter your review comments into this form. When comments are complete, attach the form using the Add File button in the applet in the lower part of the screen. NOTE: Remember to click the Save button at the bottom of the applet, or the file will not actually be added. Complete this assignment by clicking the Task Complete button.

NOTE: In order to see if you are a Mandatory or Optional Reviewer, click the document link in the above screen. A screen such as the following will appear:

Click the Attachments link, as shown above. A screen such as the following will appear:

Click the document link in the Attachment box, as shown above. This will display the file showing the Mandatory and Optional Reviewers. You may return to your assignment by using the Home tab in the upper left corner of the Windchill screen, and then clicking the link to your assignment.

CONSOLIDATE COMMENTS AND UPDATE DOCUMENT – CHANGE ADMIN I

As the Change Admin I [Change Package Manager (CPM)], you will receive a Consolidate Comments and Update Document assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Consolidate Comments and Update Document assignment, as shown below:

Through either method, a screen such as the following will appear:

All comment forms will be displayed in the applet in the lower left of the screen above. Any comment form may be accessed by selecting it and clicking the Get button. To update the document being reviewed, click the Check Out and Edit icon as shown above. Save the document to your hard drive. After all edits are complete, check the document back in. Complete this assignment by clicking the Task Complete button.

DOCUMENT DISPOSITION – APPROVING AUTHORITY

As the Approver Chair (Approving Authority), you will receive a Document Disposition assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Document Disposition assignment, as shown below:

Through either method, a screen such as the following will appear:

You may access the document being reviewed by clicking the document link as shown above. After reviewing the document, select the correct radio button indicating the document disposition is:

DOCUMENT DISPOSITION – APPROVING AUTHORITY (continued)

- Approved – Ready for Release
- Approved – Ready to be Placed in the CMII review process
- Rework – Return to Receipt and Release
- Hold – Have the author wait until further notice

NOTE: If the Rework option is chosen, you are required to enter comments explaining why the document is being sent back for rework. Otherwise the following two screens will be displayed, and you'll be required to enter the Rework Comments on the second one.

Complete this assignment by clicking the Task Complete button.

RELEASE VERIFICATION – EVALUATOR

As the Evaluator (Receipt and Release Role), you may receive a Release Verification assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Release Verification assignment, as shown below:

Through either method, a screen such as the following will appear:

You may access the document by clicking the document link, as shown above. Review the document for format and completeness. Move the document to the appropriate library or other location. Complete this assignment by clicking the Task Complete button.

RELEASE CMII – EVALUATOR

As the Evaluator (Receipt and Release Role), you may receive a Release CMII assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Release CMII assignment, as shown below:

Through either method, a screen such as the following will appear:

You may access the document by clicking the document link, as shown above. Review the document for format and completeness. Move the document to the appropriate location to begin CMII processing. Complete this assignment by clicking the Task Complete button.

HOLD – AUTHOR

As the Document Author, you may receive a Hold assignment e-mail from Windchill. You may click the assignment link in the e-mail to access your assignment. Alternatively, from your Windchill Home tab, click the Hold assignment, as shown below:

Through either method, a screen such as the following will appear:

Place the document in a location to be held until further notice. Complete this assignment by clicking the Task Complete button.